

ORGANIZATION LOBBYIST REGISTRATION FORM

[Form EC-802]



INTRODUCTION

Businesses and organizations must register with the City Clerk within ten calendar days of qualifying as an "Organization Lobbyist." The City's Lobbying Ordinance defines "Organization Lobbyists" to mean any business or organization, including any non-profit entity, that provides compensation to one or more employees for the purpose of lobbying on behalf of the business or organization and who have a total of 10 or more separate contacts with one or more City Officials for that purpose within 60 consecutive calendar days." See the Ethics Commission Fact Sheet: "Am I a Lobbyist" for more information.

Organization Lobbyists register by completing and filing this Registration Form with the City Clerk, and paying the applicable registration fees. On this form, identify your organization's lobbyists, number of contacts within the past 60 calendar days, the decisions the organization has attempted to influence in the past 60 calendar days, and the campaign fundraising activities, campaign-related services, and City contracts associated with the owners, compensated officers, and lobbyists in your organization.

File one Registration Form to cover the activities of the entire organization. Note that this is a departure from the City's previous reporting procedures. Under the new procedures, individual lobbyists do not register. All information relevant to an individual lobbyist should be contained within the organization's Registration Form.

The Registration Form is available from the City Clerk. Electronic versions are available on the City Clerk's website: www.sandiego.gov/city-clerk/elections/lobby/index.shtml

You may type or print on the form. If printing, use blue or black ink. If using the electronic version of the form, note that you can type on the form with your computer, but you cannot save the information you enter unless you have the full version of Adobe Acrobat.

When you file the Registration Form, include only the cover sheet and the schedules that contain the organization's disclosures. Do not file the instruction sheets or any schedules on which the organization has nothing to report.

File the original completed and signed form with the City Clerk.

Registration Terminates Every January 5. Annual Re-Registration is Required.

COMPLETING THE FORM

Cover Sheet

- Identify the calendar year in the upper left-hand portion of the form.
- If the report is an amendment, check the applicable box. You are required to file an amendment when information on a previously filed Registration Form has changed, e.g., the organization adds a new lobbyist. You must amend your Registration Form within ten calendar days of the change in information.
- Identify the name, address, and telephone number of the organization.
- If your organization has no information to report in a particular section, check the applicable box to indicate that fact. Do not attach schedules for which you have nothing to report. For more information, see the instructions for each schedule, which are located immediately preceding the applicable schedule.
- After you have completed the Registration Form, identify the total number of pages you are submitting. Count the cover sheet and all attached schedules. Do not count (and do not file) any of the instruction sheets or any schedules that are blank.
- A duly authorized owner or officer of the organization must complete the bottom of the cover sheet to verify the accuracy of the information disclosed on the Registration Form.

Calendar Year

20__

CITY OF SAN DIEGO

ORGANIZATION LOBBYIST REGISTRATION FORM

[Form EC-802]

For Official Use Only

Fees Due: \$_____

Type or Print in Ink. File Original with the City Clerk.

☐ Check Box if an Amendment

Total Number of Pages: _____

Identify the organization

Name of Business/Organization

Telephone Number

Business Address (Number & Street)

(City)

(State)

(Zip)

Schedule A: Municipal Decisions

Part 1: Number of Contacts. Complete Part 1 by identifying the number of lobbying contacts within the preceding 60 calendar days. Part 2: Description of Decisions. Complete Part 2 by describing each municipal decision the organization sought to influence during the preceding 60 calendar days.

Schedule B: Organization Disclosure

Part 1: Description of Organization. Complete Part 1 by describing the nature and purpose of the organization. Part 2: Lobbyist Disclosure. Complete Part 2 by identifying each owner, officer, and employee of the organization who is authorized to lobby City Officials on behalf of the organization.

Schedule C: Activities Disclosure

Part 1: Fundraising Activities. Complete Part 1 by listing all owners, compensated officers, and lobbyists of the organization who fundraised \$1,000 or more for a current elected City Official within the last two years. If no one in the organization engaged in such fundraising activities, check this box: ☐

Part 2: Campaign Services. Complete Part 2 by listing all owners, compensated officers, and lobbyists of the organization who provided compensated campaign services to an elected City Official within the last two years. If no one in the organization provided such campaign services, check this box: ☐

Part 3: Contract Services. Complete Part 3 by listing all owners, compensated officers, and lobbyists of the organization who provided compensated services under a City contract within the last two years. If no one in the organization provided such contract services, check this box: ☐

VERIFICATION

I have been authorized by the Organization Lobbyist identified above to make this verification. I have reviewed and understand the requirements of the Lobbying Ordinance (San Diego Municipal Code §§ 27.4001-27.4055). I have exercised reasonable diligence in the course of reviewing this Registration Form for completeness and accuracy. I declare under penalty of perjury under the laws of the State of California that the contents of this Registration Form, including all attached schedules, are true, correct, and complete, except as to those matters which are stated on information and belief, and as to those matters I believe them to be true.

Executed on _____ at _____
(Date) (City and State)

By: _____
(Signature) (Print Name) (Title)

Note: Registration Terminates Every January 5. Annual Re-Registration is Required.

Instructions for Schedule A: Municipal Decisions

Use this schedule to identify every municipal decision the organization sought to influence during the 60 calendar days preceding the filing of the Registration Form.

Completing the form:

- Identify the organization's name at the top of the schedule.
- For Part 1, Number of Lobbying Contacts, state the number of separate contacts (meetings, telephone calls, letters, e-mails, etc.) that the owners, officers, and employees of the organization had with City Officials during the preceding 60 calendar days in attempts to influence City decisions.
 - ✓ State the total number of contacts for all decisions.
 - ✓ Consult the Ethics Commission's Fact Sheet: Am I a Lobbyist? for information regarding how to calculate the number of contacts.
 - ✓ Include contacts by uncompensated officers of the organization. Even though these individuals are exempt from activities on Schedule C, their lobbying activities are still reportable on Schedule A.
 - ✓ When calculating the number of contacts, do not include instances where someone from the organization spoke at a public meeting, such as a meeting of the City Council.
 - ✓ Also do not include any communications that are subject to one of the exceptions identified in the Lobbying Ordinance. Consult the Ethics Commission's Fact Sheet: Exceptions to the Lobbying Ordinance for additional information.
- For Part 2, Description of Municipal Decisions, describe each municipal decision that the organization sought to influence during the previous 60 calendar days.
 - ✓ Describe either the specific municipal decision for which the organization lobbied (e.g., Living Wage Ordinance) or the general types of municipal decisions for which the organization lobbied (e.g., any matter relating to City storm drain pollution).
 - ✓ Identify the outcome the organization sought. For example, "passage of the Living Wage Ordinance" or "the adoption of stricter laws and policies designed to reduce storm drain pollution."
- Check the box at the bottom of the page if you have additional decisions to report, and disclose that information on a continuation sheet (i.e., another copy of the "Municipal Decisions" schedule). Be sure to identify the name of the organization on each continuation sheet. There is no need to fill out Part 1 on any continuation sheets.

SCHEDULE A: MUNICIPAL DECISIONS

Name of Organization Lobbyist: _____

PART 1 – NUMBER OF LOBBYING CONTACTS (PRECEDING 60 DAYS)

Number of separate contacts that the owners, officers, and employees of the organization had with City Officials during the preceding 60 calendar days in attempts to influence a City decision: _____

PART 2 – DESCRIPTION OF MUNICIPAL DECISIONS (PRECEDING 60 DAYS)

Description of decision that the organization sought to influence: _____

Outcome sought: _____

Description of decision that the organization sought to influence: _____

Outcome sought: _____

Description of decision that the organization sought to influence: _____

Outcome sought: _____

Description of decision that the organization sought to influence: _____

Outcome sought: _____

☐ If more space is needed, check box and attach continuation sheet(s).

Instructions for Schedule B: Organization Disclosure

This schedule must be completed as part of an Organization Lobbyist's registration. Use this schedule to identify every owner, officer, and employee in the organization who is authorized to lobby the City. "Lobbying" means direct communication with a City Official for the purpose of influencing a municipal decision on behalf of the organization.

Completing the form:

- Identify the organization's name at the top of the schedule.
- For Part 1, Description of Organization, describe the nature and purpose of the organization. For example:
 - ✓ XYZ Corporation may describe itself as a "commercial real estate development corporation."
 - ✓ Green Energy Now! may describe itself as "a non-profit organization that advocates for the use of environmentally safe energy sources."
- For Part 2, Lobbyist Disclosure, list the first and last name of every individual in the organization who is authorized to lobby the City.
 - ✓ Identify each individual who will be communicating with City Officials for the purpose of influencing City Officials on behalf of the organization.
 - ✓ Include individuals who will lobby the City, even if lobbying is only a small part of their duties for the organization.
 - ✓ Include uncompensated officers of the organization who are authorized to lobby. Even though these individuals are exempt from activities on Schedule C, their lobbying activities are still reportable on Schedule B.
 - ✓ Because "lobbying" does not include speaking at public meetings, such as meetings of the City Council, the organization need not identify anyone whose sole communications with City Officials will be limited to remarks made at such public forums.
- Check the box at the bottom of the page if you have additional information to report, and disclose that information on a continuation sheet (i.e., another copy of the "Organization Disclosure" schedule). Be sure to identify the name of the organization on each continuation sheet. There is no need to fill out Part 1 on any continuation sheets.
- If you are filing an amendment to a Registration Form filed earlier in the year, identify only the names of the new lobbyists; do not repeat the names of individuals already registered for the year.



Note: Even if particular individuals have not previously lobbied the City or have no immediate plans to do so, the organization may wish to include their names on this schedule if there is a possibility that they will lobby the City later in the year. This will prevent the organization from having to amend its Registration Form if these individuals ultimately do engage in lobbying.

SCHEDULE B: ORGANIZATION DISCLOSURE

Name of Organization Lobbyist: _____

PART 1 – DESCRIPTION OF ORGANIZATION

Describe the nature and purpose of the organization: _____

PART 2 – LOBBYIST DISCLOSURE

Identify the Organization’s Lobbyists. List the name of each owner, officer, and employee of the organization who is authorized to lobby City Officials on behalf of the organization.

<u>Name of Individual</u>	<u>Name of individual</u>
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

☐ If more space is needed, check box and attach continuation sheet(s).

Instructions for Schedule C: Activities Disclosure

Use this schedule to identify the fundraising activities, campaign services, and City contracting services provided by any owner, compensated officer, or lobbyist in the organization during the past two years.

Completing the form:

- Identify the organization's name at the top of the schedule.
- For Part 1, Fundraising Activities, identify each owner, compensated officer, and lobbyist in the organization who engaged in "fundraising activities" for a current elected City Official within the past two years, along with the name of the applicable City Official.
 - ✓ Do not report fundraising activities for a candidate who lost or withdrew from the election.
 - ✓ "Fundraising activity" means soliciting, or directing others to solicit, campaign contributions from one or more contributors, either personally or by hosting or sponsoring a fundraising event, and either:
 - (1) personally delivering \$1,000 or more in contributions to a candidate or a candidate's controlled committee, or
 - (2) identifying oneself to a candidate or a candidate's controlled committee as having any degree of responsibility for \$1,000 or more in contributions received as a result of that solicitation.
 - ✓ When determining whether or not someone has reached the \$1,000 threshold, keep in mind that the amount of contributions attributable to an individual is the total amount raised, even if that individual was one of several persons involved in a fundraising effort. Do not divide the total amount raised by the number of persons involved in the fundraising activities.
 - ✓ Do not report fundraising activities that took place prior to January 1, 2007.
- For Part 2, Campaign Services, identify each owner, compensated officer, and lobbyist in the organization who received compensation to provide campaign-related services, such as serving as a consultant or treasurer, to a current elected City Official within the past two years, along with the name of the applicable City Official.
 - ✓ Do not report volunteer services provided to a campaign.
 - ✓ Do not report services provided to a candidate who lost or withdrew from the election.
 - ✓ Do not report campaign services that were provided prior to January 1, 2007.
- For Part 3, Contract Services, identify each owner, compensated officer, and lobbyist in the organization who received compensation to provide services to a City department, agency, or board within the past two years, along with the name of the applicable City department, agency, or board.
 - ✓ Report City employee, City consultant, and City independent contractor contracts.
 - ✓ Do not report volunteer services, such as serving on a City board, commission, or committee.
 - ✓ Do not report any City contract services that were provided prior to January 1, 2007.
- Check the box at the bottom of the page if you have additional activities to report, and disclose those activities on a continuation sheet (i.e., another copy of the "Activities Disclosure" schedule). Be sure to identify the name of the organization on each continuation sheet.

SCHEDULE C: ACTIVITIES DISCLOSURE

Name of Organization Lobbyist: _____

PART 1 – FUNDRAISING ACTIVITIES

Identify Fundraising Activities List each owner, compensated officer, and lobbyist of the organization who engaged in “fundraising activities” for a current elected City Official in the last two years, along with the name of the City Official.

<u>Name of Individual</u>	<u>Name of Current Elected City Official</u>
_____	fundraised for: _____
_____	fundraised for: _____
_____	fundraised for: _____
_____	fundraised for: _____

PART 2 – CAMPAIGN SERVICES

Identify Campaign Services List each owner, compensated officer, and lobbyist of the organization who provided compensated campaign-related services, including consulting services, to a current elected City Official within the past two years, along with the name of the City Official.

<u>Name of Individual</u>	<u>Name of Current Elected City Official</u>
_____	worked for: _____
_____	worked for: _____
_____	worked for: _____
_____	worked for: _____

PART 3 – CONTRACT SERVICES

Identify Contract Services. List each owner, compensated officer, and lobbyist of the organization who provided compensated services under a City contract within the past two years.

<u>Name of Individual</u>	<u>Name of City Department, Agency, or Board</u>
_____	worked for: _____
_____	worked for: _____
_____	worked for: _____
_____	worked for: _____

☐ If more space is needed, check box and attach continuation sheet(s).